

ICE CMII ECR Process and Workflow Tasks (by role)

Task	Workflow Task	Submitter	Evaluator	Organization Leader	Change Admin I	Screener	Reviewer	Reviewer Chair
Initiate ECR from Product Folders page		<u>X</u>						
Complete "Create ECR" attributes		<u>X</u>						
Add Affected Data to ECR (if required)		<u>X</u>						
Add Attachments to ECR (if required)		<u>X</u>						
	"Submit ECR" Workflow Task	<u>X</u>						
	"Receipt and Release" Workflow Task		<u>X</u>					
	"ECR Submittal Approval Confirmation" Workflow Task			<u>X</u>	<u>X</u>			
	"Rework ECR" Workflow Task	<u>X</u>						
	"Choose Track" Workflow Task		<u>X</u>			<u>X</u>		
	"Assign Reviewers and Reviewer Chair" Workflow Task				<u>X</u>			
	"Review Document" Workflow Task						<u>X</u>	

Click the "X" for details on completing this task.

Use the "Back" button on the Web toolbar to return to previous location in this document.

Task	Workflow Task	Submitter	Evaluator	Organization Leader	Change Admin I	Screener	Reviewer	Reviewer Chair
	"Collect and Summarize Comments" Workflow Task	<u>X</u>			<u>X</u>			
	"Conduct CRB Review" Workflow Task							<u>X</u>
	"Update Change Package" Workflow Task				<u>X</u>			
	"Prepare for Implementation" Workflow Task				<u>X</u>			

Click the "X" for details on completing this task.

Use the "Back" button on the Web toolbar to return to previous location in this document.

ECN Process and Workflow Tasks (by role)

Task	Workflow Task	Change Admin II	Evaluator	Organization Administrator	Approver	Approver Chair	ECR Author	Author	Designated User	Change Admin III
Create ECN from ECR Details page		<u>X</u>								
Complete "Create ECN" attributes		<u>X</u>								
Add Associated ECRs to ECN (if required)		<u>X</u>								
Add Attachments to ECN (if required)		<u>X</u>								
Add tasks to the ECN Implementation Plan		<u>X</u>								
	"Submit ECN" Workflow Task	<u>X</u>								
	"Receipt and Release" Workflow Task		<u>X</u>							
	"Rework ECN" Workflow Task	<u>X</u>								
	"Secretariat Review" Workflow Task			<u>X</u>						
	"Assign Approvers and Chair" Workflow Task	<u>X</u>								

Click the "X" for details on completing this task.

Use the "Back" button on the Web toolbar to return to previous location in this document.

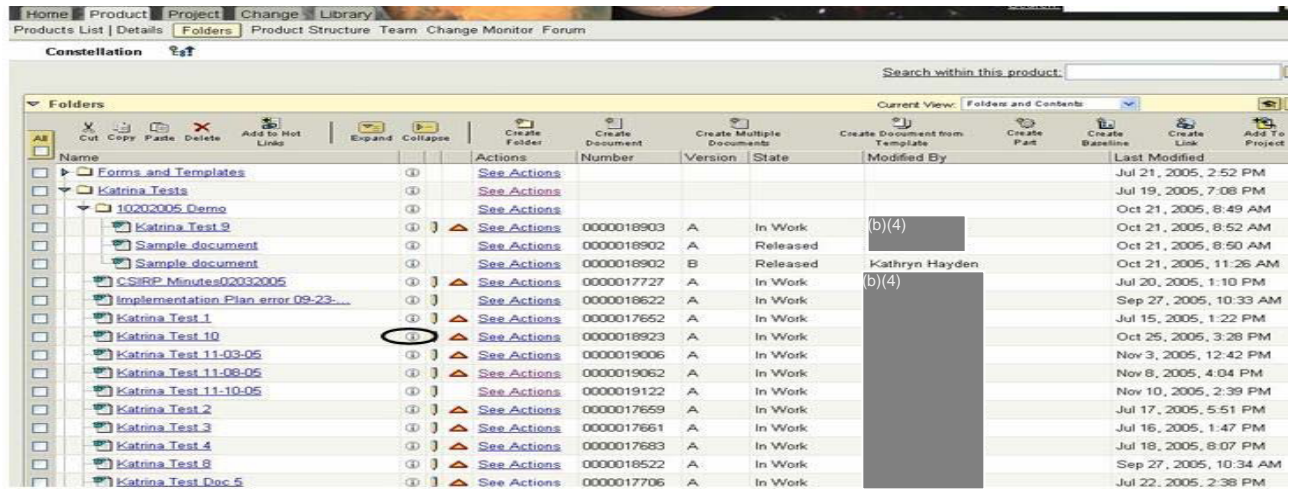
Task	Workflow Task	Change Admin II	Evaluator	Organization Administrator	Approver	Approver Chair	ECR Author	Author	Designated User	Change Admin III
	"ECR Disposition Concurrence" Workflow Task				<u>X</u>					
	"Conduct CIB Review" Workflow Task					<u>X</u>				
	"Amend ECN Plan" Workflow Task	<u>X</u>					<u>X</u>			
	"Update ECN and Implementation Plan" Workflow Task	<u>X</u>								
	"Complete ECN Task" Workflow Task							<u>X</u>		
	"Review ECN Task" Workflow Task								<u>X</u>	
	"Rework ECN Task" Workflow Task							<u>X</u>		
	"Release Data" Workflow Task		<u>X</u>							
	"Audit ECN" Workflow Task									<u>X</u>

Click the "X" for details on completing this task.

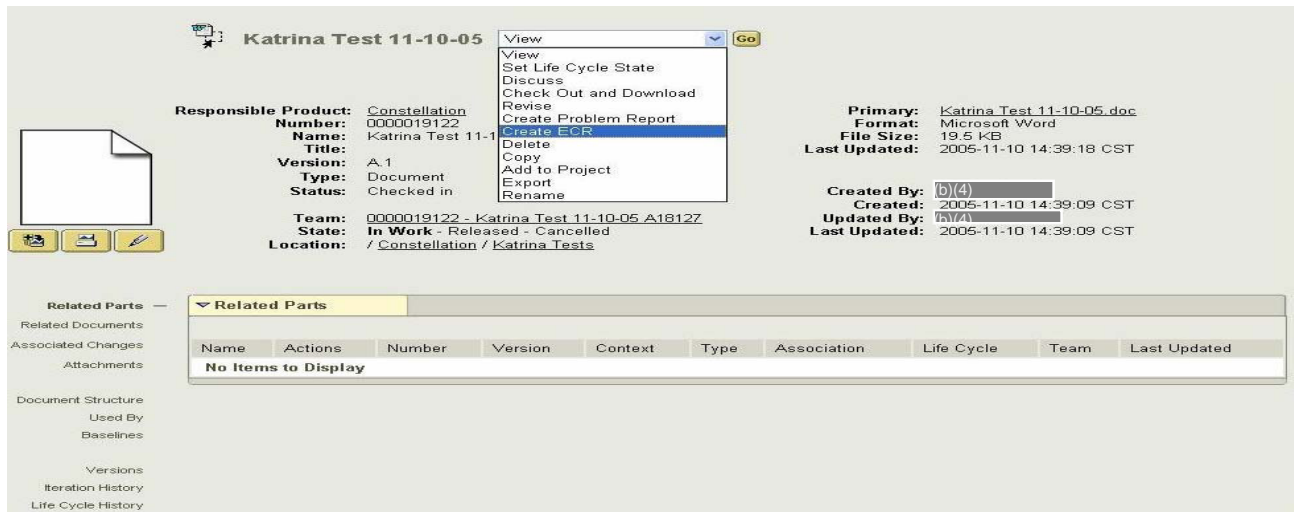
Use the "Back" button on the Web toolbar to return to previous location in this document.

Initiate ECR from Product Folders page

From the Product/Folders tab in Windchill, select the Details page for the document by clicking the circled "i" icon next to the document link.



Choose "Create ECR" from the pulldown menu at the top of the Details page and click the "Go" button



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Complete “Create ECR” screen inputs

On the Description tab of the “Create ECR” window, enter the following information:

ECR Title

ECR Classification: choose Programmatic Issue or Technical Issue

ECR Description

Proposed Solution

Priority Level: choose Routine, Urgent or Emergency

Need by date

Recurring Cost Estimate

Non Recurring Cost Estimate

PCN [Number]

Initiator

Initiator Organization

Initiator Email

Initiator Telephone

NOTE: Do not click the yellow “OK” button until all ECR fields are completed; use “NA” or “TBD” for fields that are not applicable or available. Choose “Submit Later” to allow for updates to the ECR before submitting to the Receipt and Release Desk.

The screenshot shows the 'Create Enterprise Change Request (ECR)' window with the 'Description' tab selected. The window has a blue title bar and a toolbar with a back button and a help button. Below the title bar are five tabs: 'Description', 'Affected Data', 'Affected End Items', 'Attachments', and 'Associated PRs'. The 'Description' tab is active, displaying a form with the following fields and values:

- Responsible Product:** Constellation
- ECR Type:** NASACHangeRequest
- * ECR title:** ECR-1114-001
- * ECR classification:** Programmatic Issue (dropdown menu)
- * ECR description:** description (text area)
- Proposed solution:** (text area)
- * Priority level:** Routine (dropdown menu)
- Need by:** 11/30/2005 (MM/DD/YYYY)
- Recurring Cost Estimate:** (text field)
- Non Recurring Cost Estimate:** (text field)
- * 01. PCN:** 123456
- * 02. Initiator:** (b)(4) (text field)
- * 03. Initiator Organization:** NP
- * 04. Initiator Email:** (b)(4) (text field)
- * 05. Initiator Telephone:** 256-544-2732

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Further down on the Description tab of the "Create ECR" window, enter the following information:

Element Effectivity (select entry from pull-down menu; one per box; click "Use Default (Leave Blank)" button for any unused blocks)

Safety and Mission Assurance: flight or industrial safety impact: choose one

"True" if there are flight or industrial safety impacts for this ECR

"False" if there are NO flight or industrial safety impacts for this ECR

Flight and industrial safety impacts have been identified and incorporated in this ECR: choose one

"True" if flight or industrial safety impacts have been identified/incorporated in this ECR

"False" if flight or industrial safety impacts have NOT been identified/incorporated in this ECR

Criticality: Provide 2-digit code (only if flight/safety impacts in this ECR). If not applicable, enter "NA"

Total Cost: Enter in this format "9999K" or "9999M"

FY Cost: Use one block for each FY, in this format "FY99 9999K" or "FY99 9999M". Enter "NA" in unused blocks.

Schedule Impact: Enter text or "NA" (if not applicable)

NOTE: Do not click the yellow "OK" button until all ECR fields are completed; use "NA" or "TBD" for fields that are not applicable or available. Choose "Submit Later" to allow for updates to the ECR before submitting to the Receipt and Release Desk.

* 06. Element Effectivity:	CLV Project	Use Default: (Leave Blank...)
* 07. Element Effectivity:	(Leave Blank)	Use Default: (Leave Blank...)
* 08. Element Effectivity:	(Leave Blank)	Use Default: (Leave Blank...)
* 09. Element Effectivity:	(Leave Blank)	Use Default: (Leave Blank...)
* 10. Element Effectivity:	(Leave Blank)	Use Default: (Leave Blank...)
* 11. Element Effectivity:	(Leave Blank)	Use Default: (Leave Blank...)
* 12. Element Effectivity:	(Leave Blank)	Use Default: (Leave Blank...)
* 13. Element Effectivity:	(Leave Blank)	Use Default: (Leave Blank...)
* 14. Safety and Mission Assurance: flight or industrial safety impact:	true	Use Default: false
* 15. Flight and industrial safety impacts have been identified and incorporated in this ECR:	true	Use Default: false
* 16. Criticality:	1A	
* 17. Total Cost:	200K	
* 18. FY Cost:	FY06 200K	
* 19. FY Cost:	FY07 000K	
* 20. FY Cost:	FY08 000K	
* 21. FY Cost:	FY09 000K	
* 22. FY Cost:	FY10 000K	
* 23. Schedule Impact:	NA	

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Further down on the Description tab of the "Create ECR" window, enter the following information:

Weight Impact: Enter text or "NA" (if not applicable)

Justification for Change: Enter text

Submittal Approval: Enter name of person approving the Initiator's submittal of this ECR

Submittal Approval Organization:

Submittal Approval Email:

Submittal Approval Telephone

Choose **Submit "Now"** or **"Later"**

NOTE: Do not click the yellow "OK" button until all ECR fields are completed; use "NA" or "TBD" for fields that are not applicable or available. Choose "Submit Later" to allow for updates to the ECR before submitting to the Receipt and Release Desk.

* 24. Weight Impact:	<input type="text" value="NA"/>
* 25. Justification for Change:	<input type="text" value="it's the right thing to do!"/>
* 26. Submittal Approval:	<input type="text" value="Bill Anglin"/>
* 27. Submittal Approval Organization:	<input type="text" value="CLV"/>
* 28. Submittal Approval Email:	<input type="text" value="bill.anglin@nasa.gov"/>
* 29. Submittal Approval Telephone:	<input type="text" value="256-544-0000"/>
Submit <input type="radio"/> Now <input checked="" type="radio"/> Later	
* Required fields	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

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Add Affected Data to ECR (if required)

Click the "Affected Data" tab on the "Create ECR" screen. The document for which the ECR has been created will appear in the "Affected Data" window. To add any other documents affected by this ECR, click "Add Affected Data" and search for the document using the fields on the "Find Affected Data" window.

NOTE: Do not click the yellow "OK" button until all available affected data/attachments have been added to the ECR. Choose "Submit Later" to allow for updates to the ECR before submitting to the Receipt and Release Desk.

The screenshot shows the 'Create Enterprise Change Request (ECR)' window with the 'Affected Data' tab selected. The window has a title bar with a back button and a help button. Below the title bar are tabs for 'Description', 'Affected Data', 'Affected End Items', 'Attachments', and 'Associated PRs'. The 'Affected Data' tab is active, showing a 'Drop items here.' area with a folder icon. Below this is a table with columns: Name, Number, Version, Type, and Source. The table contains one entry: 'Katrina Test 11-10-05' with Number '0000019122', Version 'A', and Type 'Document'. There are 'All', 'Remove', and 'Add Affected Data' buttons. At the bottom right are 'OK' and 'Cancel' buttons.

Name	Number	Version	Type	Source
Katrina Test 11-10-05	0000019122	A	Document	

Enter search criteria in one or more fields in this window and click the "Search" button.

NOTE: "*" may be used for partial entries.

The screenshot shows the 'Find Affected Data' window. It has a title bar with a help button. Below the title bar is a dropdown menu currently set to 'Document'. Below this are several input fields with labels: 'Number:', 'Name:', 'Type:' (with a dropdown arrow), 'Version:', 'State:' (with a dropdown arrow), 'Format:' (with a dropdown arrow), 'Created By:' (with the text '*norris' and a 'Browse...' button), 'Updated By:' (with a 'Browse...' button), and 'Last Updated:' (with a date format '(MM/DD/YYYY)'). At the bottom center is a 'Search' button.

Use the "Back" button on the Web toolbar to return to previous location in this document.

Select the affected data from the “Search Results” window by checking the box next to each document. Click the “**Add Selected Items**” button at the bottom of the window.

Search Results						
	Number	Name	Version	Team	Stat	
<input checked="" type="checkbox"/>	 0000000262	Dry Run Constellation Doc	B	<u>0000000262 - Dry Run Constellation Doc B17127</u>	In W	
<input checked="" type="checkbox"/>	 0000017652	Katrina Test 1	A	<u>0000017652 - Katrina Test 1 A16965</u>	In W	
<input type="checkbox"/>	 0000017727	CSIRP Minutes02032005	B	<u>0000017727 - CSIRP Minutes02032005 B17146</u>	In W	
<input type="checkbox"/>	 0000017727	CSIRP Minutes02032005	A	<u>0000017727 - CSIRP Minutes02032005 A17029</u>	In W	

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Add Attachments to ECR (if required)

Click the "Attachments" tab to add any attachments to the ECR.

Click the "**Browse**" button and browse to the relevant file, then click the "**Add**" button.

NOTE: Do not click the yellow "OK" button until all available affected data/attachments have been added to the ECR. Choose "Submit Later" to allow for updates to the ECR before submitting to the Receipt and Release Desk.

The screenshot shows the 'Create Enterprise Change Request (ECR)' window with the 'Attachments' tab selected. The window has a title bar and a toolbar with a back button and a help button. Below the title bar are five tabs: 'Description', 'Affected Data', 'Affected End Items', 'Attachments' (selected), and 'Associated PRs'. The main area contains an 'Add:' label, a text box with the path 'd:\documents and settings\norrike\Desktop\CM II', and a 'Browse...' button. Below this is an 'Add' button. At the bottom of the main area is a table with the following columns: 'File name', 'Format', 'File size', 'Last modified', and 'Created by'. The table currently displays 'No Items to Display'. At the bottom right of the window are 'OK' and 'Cancel' buttons.

File name	Format	File size	Last modified	Created by
No Items to Display				

Repeat this procedure for each file to be attached.

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“Submit ECR” Workflow Task

Responsible Role: Submitter

If ECR updates are required, click the ECR link to access the ECR’s Details page and make updates. See [“Updating ECR from ECR Details Page”](#) for detailed instructions.

Click the “**Task Complete**” button when the ECR is complete ready for submittal to the Receipt and Release Desk.

Submit ECR

Instructions: Submit the Enterprise Change Request (ECR) for review by CS Receipt and Release.

- Complete the assignment by clicking on the Task Complete button.

Process Initiator: (b)(4)


Priority: Highest

Assignee: [Redacted]

Due Date:

Role: Submitter

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“Receipt and Release” Workflow Task

Responsible Role: Evaluator

Review the ECR and determine if it is ready for processing. Make role/participant assignments and record accept/rework vote per task instructions. See “[Assigning Roles to Participants in Workflow Tasks](#)” for detailed instructions.

Windchill Role	Process Role
Change Admin I	Change Package Manager
Screener	Screening Group Chair
Evaluator	Receipt and Release Desk
Organization Leader	Submittal Approval contact/authority

Click the “**Task Complete**” button after all role/participant assignments and accept/rework vote have been recorded.

Receipt and Release

Instructions:

- Assign participants to Change Admin I, Screener, and Evaluator (as required).
- Assign participant to the Organization Leader role. Obtain name from the "Submittal Approval" fields on the ECR Details page. NOTE: If the person indicated as "Submittal Approval" is not available to be assigned a role, contact the person and obtain written approval or disapproval for the ECR (a PDF copy of an email will be sufficient). The Change Admin I will attach the written authorization in the "ECR Submittal Approval Confirmation" task.
- Select "Save" after assigning participants to these roles.
- Evaluate the ECR and Affected Data Item and determine if ready for screening.
- If not ready, select the Rework radio button and enter a comment explaining the needed rework.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: CDM Tester 1
Priority: Highest

Assignee: Kathryn Hayden
Due Date:

Role: Evaluator

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Rework Comment:

☒ Accept
 ☐ Rework

Task Complete

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“ECR Submittal Approval Confirmation” Workflow Task

Responsible Role: Organization Leader*

*NOTE: Change Admin I also receives this task

Review the ECR and determine if it should be submitted for further processing or if rework is required.

Click the “**Task Complete**” button after completing the tasks detailed in the task instructions.

ECR Submittal Approval Confirmation

Instructions: The attached Enterprise Change Request (ECR) has been submitted for processing. You have been indicated as the authority responsible for approving the submittal of this ECR for further processing. Please review the attached ECR and indicate if you approve its submittal for further processing. NOTE: The ECR will not be processed further until you have indicated your approval. Please follow these directions to review the ECR and record your vote:

- Click the “ECR” link below to open the ECR Details page
- The “Initiator” data fields provide name and contact information for the person who submitted the ECR
- Review the ECR information on the ECR Details page to determine if you approve the submittal of the ECR for further processing
- To record your vote and complete this task, click the “Home” tab from the Details page and return to your task in the Home/Overview page.
- If the ECR requires further work, select the “Rework” radio button and enter rework details in the “Comments” text box. This will send the ECR back to the Submitter for rework. When the Submitter has completed the rework, you will receive this task again for final approval.
- If you approve the submittal of the ECR, select “Approve ECR Submittal” radio button. This will send the ECR forward to the Screener for further processing.
- If you disapprove the submittal of the ECR, select “Disapprove ECR Submittal” radio button. This will cancel the ECR.
- NOTE: The ECR will not move forward for further processing until you vote “Approve” and complete this task. If you select “Rework,” you will receive this task again for final approval.
- NOTE to Change Admin I (if completing this task for Submittal Approval role): Attach written approval/disapproval documentation from the Submittal Approval authority by using the Add File function below. Select the appropriate radio button to indicate the Submittal Approval authority's approval or disapproval.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: [CDM Tester 1](#)

Assignee: [CDM Tester 1](#)

Role: Change Admin I

Priority: Highest

Due Date:

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Rework Comment:

☒ Approve
☐ Rework
☐ Disapprove

Task Complete

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“Rework ECR” Workflow Task

Responsible Role: Submitter

“Rework” is required for this ECR, per the “Receipt and Release” or “ECR Submittal Approval Confirmation” task.

Review the Rework Comments in this task and perform the required rework. Update the ECR by clicking the ECR link in this task and following the detailed instructions in “[Updating ECR from ECR Details Page.](#)”

Click the “**Task Complete**” button when rework has been completed.

Rework ECR


Instructions: Submit the Enterprise Change Request (ECR) for review by CS Receipt and Release.

- Based on the comments noted below, complete the required rework before clicking the Task Complete button.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: (b)(4)
 Priority: Highest

Assignee:
Due Date:

Role: Submitter
 Process: ICE - CMII ECR Workflow_00604 - ECR-1114-001

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Rework Comment: rework this please

Task Complete

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“Choose Track” Workflow Task

Responsible Role: Screener*

*NOTE: Evaluator also receives this task

Determine if this ECR will go through the Fast Track or Full Track version of the workflow. If you choose “Fast Track,” the workflow bypasses the Change Review Board comments/concurrence review and CRB Chair decision and goes directly to the “Update Change Package” task. If you choose “Full Track,” the ECR undergoes a Change Review Board (CRB) review and CRB Chair decision via the workflow.

Determine the names of the Change Review Board “Reviewers” and “Reviewer Chair,” complete the *Screening Group Checklist* form and attach the form to the workflow. See “[Attaching Files into Workflow Tasks](#)” for detailed instructions. NOTE: Multiple “Reviewers” will receive a tasks instructing them to review the ECR and provide comments before the review deadline. One “Reviewer Chair” will receive a task at the conclusion of the review to record the CRB decision.


Click the “**Task Complete**” button after choosing track and attaching file.

Choose Track

Instructions:

- Choose Fast Track or Full Track.
- Complete the [CSScreeningGroupCheckList](#), using the linked form.
- Use the Add File function below to attach the Screening Group Checklist, and select "Save" after loading the file.
- NOTE: This task is assigned to the "Screener" and "Evaluator" roles; however, only one person needs to complete the task.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: CDM Tester 1	Priority: Highest
Assignee: CDM Tester 1	Due Date:
Role: Evaluator	Process: ICE - CMIL ECR Workflow_00761 - 12-07 Test ECR 8

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☒ Full Track - review cycle and Panel or Board
☐ Fast Track - no review cycle and no Panel or Board

Task Complete

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“Assign Reviewers and Reviewer Chair” Workflow Task

Responsible Role: Change Admin I

Input the review deadline and make role/participant assignments (as indicated by the *Screening Group Checklist* form), per task instructions. Click the link to the completed *Screening Group Checklist* form (under the “Task Complete” button) for Reviewer and Reviewer Chair names. See “[Assigning Roles to Participants in Workflow Tasks](#)” for detailed instructions.

Windchill Role	Process Role
Reviewer	Change Review Board (CRB) members
Reviewer Chair	CRB Chair

Click the “**Task Complete**” button after entering deadline and making role/participant assignments.

Assign Reviewers and Reviewer Chair

Instructions:

- Assign participants to the Reviewer role.
- Assign participants to the Reviewer Chair role.
- Select "Save" after completing assignment of participants to these roles.
- Set the review deadline (mm/dd/yyyy).
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: b(4)
Assignee: 
Role: Change Admin I

Priority: Highest
Due Date:
Process: ICE - CMII ECR Workflow_00604 - ECR-1114-001

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***Review Deadline:**

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“Review Document” Workflow Task

Responsible Role: Reviewer

Review the ECR and provide concurrence/non-concurrence vote and comments per task instructions. Record any comments on the Change Evaluation Form and attach file. See “[Attaching Files into Workflow Tasks](#)” for detailed instructions. NOTE: A completed Change Evaluation Form is required for “Concur with Comments” and “Non-Concur with Comments” votes.

Click the “**Task Complete**” button after recording vote and attaching file (if required).

Review Document

Instructions: You have been selected to evaluate a Constellation Systems product as part of the change approval process. Please complete this task on or before the Review Deadline noted below.

- Click the “ECR” link below to open the ECR details page.
- From the “Affected Data Items” list, click the link to the product title and save a copy of the product for review. NOTE: Do not “check out” the product.
- Review the product and click the appropriate radio button on this task page to record your vote. IF YOU CHOOSE “CONCUR WITH COMMENTS” OR “NON-CONCUR WITH COMMENTS,” YOU MUST ATTACH A COMPLETED [Change Evaluation Form](#) FORM.
- Record comments on the Change Evaluation form. NOTE: Only comments entered on the form will be considered. All comments submitted on this form will be addressed.
- Attach the completed Change Evaluation form in this task, using the “Add file” function below. Click the “Add file” button and browse to your form file. Be sure to click “Save” after loading the file.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: (b)(4)


Assignee:

Role: Reviewer

Priority: Highest

Due Date:

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Review Deadline: 11/16/2005

☒ Concur with Comments
☐ Concur with No Comments - No Impact
☐ Non-Concur with Comments

Task Complete

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“Collect and Summarize Comments” Workflow Task

Responsible Role: Submitter (“Assignee”)*

*NOTE: Change Admin I also receives this task

Collect the attached Change Evaluation Forms from the “Add File” box within this task. See “[Obtaining Files from Workflow Tasks](#)” for detailed instructions. Consolidate the comments received and summarize them into a Consolidated Change Evaluation Form. Develop presentation for the ECR.

Attach the completed Consolidated Change Evaluation Form and CRB presentation files to the workflow. See “[Attaching Files into Workflow Tasks](#)” for detailed instructions.

NOTE: This task also provides an opportunity to attach late evaluations (either due to reviewers missing the deadline or not attaching evaluations into the workflow). These evaluations may be attached using the same procedure for the presentation and consolidated change evaluation.


Click the “**Task Complete**” button after all files have been attached.

Collect and Summarize Comments

Instructions: As the Assignee for this ECR, integrate the comments received from the review cycle and create the presentation package:

- Obtain the Change Evaluation forms from the "Add file" box at the bottom of this task page. Double-click (or click the "Get" button) each of the comments files.
- Consolidate the comments into a [Consolidated Change Evaluation Form](#), using the linked template.
- Develop [CRB Presentation Format](#), using the linked template.
- Attach Consolidated Change Evaluation Form and presentation, using the "Add file" function below. Click the "Add file" button and browse to files. Be sure to click "Save" after loading the files.
- NOTE: This task is assigned to the "ECR Submitter" and "Change Admin I" roles; however, only one person needs to complete the task.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: CDM Tester 1	Priority: Highest
Assignee: CDM Tester 1	Due Date:
Role: Assignee	Process: ICE - CMII ECR Workflow_00761 - 12-07 Test ECR 8

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“Conduct CRB Review” Workflow Task

Responsible Role: Reviewer Chair

Review the consolidated change evaluation and presentation files, enter comments, and record the Change Review Board (CRB) recommendation for this ECR. See “[Obtaining Files from Workflow Tasks](#)” for detailed instructions.

Click the “**Task Complete**” button after recording votes and entering comments.

Conduct CRB Review

Instructions:

- Record Change Review Board (CRB) decision by selecting appropriate radio button. Add comments in the text box, for all votes EXCEPT 'Recommend approval (as presented)'
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: CDM Tester 1

Assignee: CDM Tester 1

Role: Reviewer Chair

Priority: Highest

Due Date:

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Comments:

☒ Recommend approval (as presented to the CRB) for implementation

☐ Recommend approval (with mods required by CRB) for implementation

☐ Recommend disapproval

☐ Defer for further review (with actions assigned to the CPE)

Task Complete

[Return to ECR Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Update Change Package” Workflow Task

Responsible Role: Change Admin I

Attach relevant documentation to the ECR workflow by using the “Add File” function within the task. See [“Attaching Files into Workflow Tasks”](#) for detailed instructions.

NOTE: This is not an “Update” to the ECR’s Details page.

Click the “**Task Complete**” button after attaching all relevant documentation (if required).

Update Change Package

Instructions:

- This task allows the Change Admin I to attach relevant documentation to the Enterprise Change Request (ECR), such as evaluation forms.
- Attach documentation to the ECR by using the Add File function below. Select "Save" after loading the file(s).
- Complete the assignment by clicking the Task Complete button

Process Initiator: CDM Tester 1

Assignee: CDM Tester 1

Role: Change Admin I

Priority: Highest

Due Date:

Process: ICE - CMII ECR Workflow_00761 - 12-07 Test ECR 8

ECR 00761 - 12-07 Test ECR 8

Task Complete

[Return to ECR Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Prepare for Implementation” Workflow Task

Responsible Role: Change Admin I

Follow the task instructions to create the Enterprise Change Notice (ECN) which will implement the changes requested in the ECR. See “[Create ECN from ECR Details Page](#)” for detailed instructions. Creating the ECN starts the change implementation process.

Click the “**Task Complete**” button after creating the ECN.

Prepare For Implementation

Instructions: Verify Enterprise Change Request (ECR) contains all attachments. If ECR is incomplete, add the missing attachments before completing this task.
Create Enterprise Change Notice (ECN) for this ECR:

- Click on the ECR link below to open the ECR details page
- Choose "Create ECN" from the pull-down menu and click "Go"
- Fill out the required ECN information in the "Create ECN" screen before completing this task
- Complete this assignment by clicking the Task Complete button

Process Initiator: (b)(4)


Assignee:

Role: Change Admin I

Priority: Highest

Due Date:

Process: [ICE - CMII ECR Workflow_00604 - ECR-1114-001](#)

 [ECR 00604 - ECR-1114-001](#)

[Return to ECR Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

Complete “Create ECN” attributes

On the Description tab of the “Create ECN” window, enter the following information:

ECN Name

ECN Description

Need by date

ECR Disposition

Choose Submit “Now” or “Later”

NOTE: Do not click the yellow “OK” button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose “Submit Later” to allow for updates in the “Submit ECN” task.

Create Enterprise Change Notice (ECN)

Description Attachments Associated ECRs Implementation Plan

Responsible Product: Constellation

ECN Type: NASACHangeNotice

*** ECN name:** ECN-1114-001

*** ECN description:** ECN to disposition ECR-1114-001

*** Need by:** 12/31/2005 (MM/DD/YYYY)

ECR Disposition: ECR-1114-001 was approved as presented on 11/14/05

Submit ☐ Now ☒ Later

* Required fields

OK Cancel

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

Add Associated ECRs to ECN (if required)

Click the "Associated ECRs" tab of the "Create ECN" screen. The ECR for which the ECN has been created will appear in the "Associated ECRs" window. To add any other associated ECRs, click "Add ECR" and search for the ECR(s) using the fields on the "Find Enterprise Change Request" window.

NOTE: Do not click the yellow "OK" button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose "Submit Later" to allow for updates in the "Submit ECN" task.

The screenshot shows the 'Create Enterprise Change Notice (ECN)' window with the 'Associated ECRs' tab selected. The window has a toolbar with 'Description', 'Attachments', 'Associated ECRs', and 'Implementation Plan' tabs. Below the tabs is a table titled 'Associated ECRs'. The table has columns: Name, Number, Change Admin, Priority, and State. There is one row with the following data: Name: ECR-1114-001, Number: 00604, Change Admin: b)(4), Priority: Routine, State: Implementation. Above the table are buttons for 'All', 'Remove', and 'Add ECR'. At the bottom right are 'OK' and 'Cancel' buttons.

Name	Number	Change Admin	Priority	State
ECR-1114-001	00604	b)(4)	Routine	Implementation

Enter search criteria in one or more fields in this window and click the "Search" button.

NOTE: "*" may be used for partial entries.


The screenshot shows the 'Find Enterprise Change Request' window. It contains several search criteria fields: Number, Name, Created By (with a 'Browse...' button), Created (with a date format '(MM/DD/YYYY)'), Need Date (with a date format '(MM/DD/YYYY)'), Complexity (dropdown), Priority (dropdown), Category (dropdown), State (dropdown), Team, Last Updated (with a date format '(MM/DD/YYYY)'), and Description. A 'Search' button is located at the bottom right.

[Return to ECN Process Matrix](#)

Use the "Back" button on the Web toolbar to return to previous location in this document.

Select the associated ECR(s) from the “Search Results” window by checking the box next to each ECR. Click the “**Add Selected Items**” button at the bottom of the window.

NOTE: ECRs that are associated with other ECNs cannot be added to this ECN.

<input type="checkbox"/>	 00522 ECR 2 10-26	(b)(4)	Programmatic Issue	Routine	Under Review
<input type="checkbox"/>	 00523 ECR 3 10-26		Programmatic Issue	Routine	Implementation
<input type="checkbox"/>	 00524 ECR 1 10-27		Programmatic Issue	Routine	Implementation
<input type="checkbox"/>	 00541 ecr 10-31		Programmatic Issue	Routine	Under Review
<input type="checkbox"/>	 00543 ECR 11-01		Programmatic Issue	Routine	Implementation
<input type="checkbox"/>	 00561 ECR 11-03		Programmatic Issue	Routine	Implementation
<input type="checkbox"/>	 00562 ECR 11-03-02		Programmatic Issue	Routine	Implementation
<input type="checkbox"/>	 00581 ECR 11-08-001		Programmatic Issue	Routine	Implementation
<input type="checkbox"/>	 00604 ECR-1114-001		Programmatic Issue	Routine	Implementation
<input checked="" type="checkbox"/>	 00605 kajsdflakj		Programmatic Issue	Routine	Open

Add Selected Items

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

Add Attachments to ECN (if required)

Click the "Attachments" tab to add any attachments to the ECN.

Click the "**Browse**" button and browse to the relevant file, then click the "**Add**" button.

NOTE: Do not click the yellow "OK" button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose "Submit Later" to allow for updates in the "Submit ECN" task.

The screenshot shows the 'Create Enterprise Change Notice (ECN)' window with the 'Attachments' tab selected. The window has a title bar with a file icon and a question mark. Below the title bar are four tabs: 'Description', 'Attachments', 'Associated ECRs', and 'Implementation Plan'. The 'Attachments' tab is active, showing an 'Add:' label, a text input field, and a 'Browse...' button. Below this is a yellow 'Add' button. At the bottom of the window are 'OK' and 'Cancel' buttons.

Attachments

	File name	Format	File size	Last modified	Created by
<input type="checkbox"/>	ECR Process.JPG	JPEG Image	133.53 KB	2005-11-16 10:27:07 CST	Katrina Norris

[Return to ECN Process Matrix](#)

Use the "Back" button on the Web toolbar to return to previous location in this document.

Add tasks to the ECN Implementation Plan

To add tasks to the ECN, go to the "Implementation Plan" tab and click "Add New Task":

The screenshot shows the 'Create Enterprise Change Notice (ECN)' window with the 'Implementation Plan' tab selected. The main area displays 'No Items to Display'. A red circle highlights the 'Add New Task' button in the bottom right corner of the main area. The 'OK' and 'Cancel' buttons are at the bottom right of the window.

Add the following information for each task:

Task Name

Description – enter either detailed changes to be made or point to the attachment that defines the changes

Author – in this case, "Author" is the "actionee" (the person responsible for completing this action)

Designated User – the person responsible for accepting the Author's (actionee's) work to close the action here assigned (usually, this will be the CPE)

Need Date

Click the "Add" button

The screenshot shows the 'Create Enterprise Change Notice (ECN)' window with the 'Implementation Plan' tab selected. The form fields are filled with the following information:

- * Task Name:** Task 1 of 2
- Task Type:** Change Activity
- * Description:** Make changes to the document per instructions
- * Author:** khayden (with a 'Browse...' button)
- * Designated User:** knorris (with a 'Browse...' button)
- Need Date:** 12/10/2005 (with a '(MM/DD/YYYY)' label)

 A red circle highlights the 'Add' button at the bottom center of the form. The 'Add New Task' button is also visible in the bottom right corner. The 'OK' and 'Cancel' buttons are at the bottom right of the window.

NOTE: Do not click the yellow "OK" button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose "Submit Later" to allow for updates in the "Submit ECN" task.

[Return to ECN Process Matrix](#)

Use the "Back" button on the Web toolbar to return to previous location in this document.

Expand the Task (click the arrow next to the task name) to add “Affected Data” and/or “Resulting Items” (as required). NOTE: Not all Implementation Plan tasks will require “Affected Data” or “Resulting Items.”

See “[Adding Affected Data to ECN Implementation Plan Tasks](#)” and “[Adding Resulting Items to ECN Implementation Plan Tasks](#).”

NOTE: Do not click the yellow “OK” button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose “Submit Later” to allow for updates in the “Submit ECN” task.

The screenshot shows a web-based form for adding tasks to an ECN Implementation Plan. The form is titled "Task 1 of 2" and has a sidebar with an "All" button. The main form area contains the following fields and sections:

- Task Name:** Task 1 of 2
- Task Type:** Change Activity
- Description:** Make changes to the document per instructions
- Author:** khayden (with a "Browse..." button)
- Designated User:** knorris (with a "Browse..." button)
- Need Date:** 12/10/2005 (MM/DD/YYYY)
- Affected Data:** A section with a table header (Number, Name, Version, State, Disposition) and a message "No Items to Display". There is an "Add Affected Data" button.
- Resulting Items:** A section with a table header (Number, Name, Version, State, Effectivity) and a message "No Items to Display". There is an "Add Resulting Item" button.

At the bottom right of the form are "OK" and "Cancel" buttons.

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Submit ECN” Workflow Task

Responsible Role: Change Admin II (Change Package Manager)

If ECN updates are required, click the ECN link in the task to access the ECN’s Details page. See “[Updating ECN from ECN Details Page](#)” for detailed instructions.

Click the “**Submit**” button when the ECN is ready for submittal to the Receipt and Release Desk.

Submit ECN

Instructions: Submit the Enterprise Change Notice (ECN) for review by Receipt and Release.

- NOTE: Complete the "Prepare for Implementation" task for the ECR (if you have not already done so).
- Complete the assignment by clicking the Submit button.

Process Initiator: (b)(4)


Priority: Highest

Assignee: [REDACTED]

Due Date:

Role: Submitter

Process: ICE - CMII ECN Workflow_00461 - ECN-1114-001

 ECN 00461 - ECN-1114-001

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Receipt and Release” Workflow Task

Responsible Role: Evaluator

Review the ECN and determine if it is ready for processing. Make role/participant assignments and record accept/rework vote per task instructions. See “[Assigning Roles to Participants in Workflow Tasks](#)” for detailed instructions.

Windchill Role	Process Role
Change Admin II	Change Package Manager
Change Admin III	Receipt and Release Desk
Organization Administrator	CIB Secretariat
ECR Author	Submitter of associated ECR

Click the “**Task Complete**” button after all role/participant assignments and accept/rework vote have been recorded.

Receipt and Release

Instructions:

- Assign participants to Change Admin II, Change Admin III, Organization Administrator, ECR Author.
- Select "Save" after assigning participants to these roles.
- Evaluate the ECN and determine if ready for processing.
- If not ready, select the Rework radio button and enter a comment explaining the needed rework.
- Complete the assignment by clicking the Task Complete button

Process Initiator: b(4)

Assignee: [Redacted]

Role: Evaluator

Priority: Highest

Due Date:

Process: ICE - CMII ECN Workflow_00461 - ECN-1114-001

[ECN 00461 - ECN-1114-001](#)

Rework Comments:

☐ Accept - Forward to Secretariat for review

☒ Rework - Return to Submitter

Task Complete

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Rework ECN” Workflow Task

Responsible Role: Submitter

“Rework” is required for this ECN, per the “Receipt and Release” task.

Review the Rework Comments in this task and perform the required rework. Update the ECN by clicking the ECN link in this task and following the detailed instructions in “[Updating ECN from ECN Details Page](#).”

Click the “**Task Complete**” button when rework has been completed.

Rework


Instructions: Rework is required for this Enterprise Change Notice (ECN).

- Complete the rework to resubmit to Receipt and Release.
- Complete the assignment by clicking the Task Complete button.

Process Initiator: (b)(4)
 Priority: Highest

Assignee:
Due Date:

Role: Assignee
 Process: ICE - CMII ECN Workflow_00461 - ECN-1114-001

 [ECN 00461 - ECN-1114-001](#)

Rework Comments: Rework task 1

Secretariat Rework Comments: -

Task Complete

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Secretariat Review” Workflow Task

Responsible Role: Organization Administrator (Secretariat)

*NOTE: Change Admin II (Change Package Manager) also receives this task

Review the ECN and determine if it is ready for processing. Record accept/rework vote, per tasks instructions. If rework is required, this ECN will return for another Secretariat Review until it is accepted.

Click the “**Task Complete**” button after recording accept/rework vote.

Secretariat Review

Instructions:

- Evaluate the ECN and determine if ready for processing.
- If not ready, select the Rework radio button and enter a comment explaining the needed rework.
- NOTE: This task is assigned to the "Organization Administrator" and "Change Admin II" roles; however, only one person needs to complete the task.
- Complete the assignment by clicking the Task Complete button.

Process Initiator: CDM Tester 1


Assignee: CDM Tester 1

Role: Change Admin II

Priority: Highest

Due Date:

Process: ICE - CMII ECN Workflow_00561 - 12-07 ECN for Test ECR 8

 ECN 00561 - 12-07 ECN for Test ECR 8

Rework Comments:

☒ Accept - Forward for CIB Review
☐ Rework - Return to Submitter

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Assign Approvers and Chair” Workflow Task

Responsible Role: Change Admin II

Input the approval deadline and make role/ participant assignments, per task instructions. See “[Assigning Roles to Participants in Workflow Tasks](#)” for detailed instructions.

Windchill Role	Process Role
Approver	Change Implementation Board (CIB) members
Approver Chair	CIB Chair

Click the “**Task Complete**” button after entering deadline and making role/ participant assignments.

Assign Approvers and Chair

Instructions:

- Assign participants to the Approver role.
- Assign participants to the Approver Chair role.
- Select "Save" after completing assignment of participants to these roles.
- Set the approval deadline (mm/dd/yyyy).
- Complete the assignment by clicking the Task Complete button.

Process Initiator: (b)(4) **Priority:** Highest
Assignee: [Redacted] **Due Date:**
Role: Change Admin II **Process:** [ICE - CMII ECN Workflow_00461 - ECN-1114-001](#)

 [ECN 00461 - ECN-1114-001](#)

Approval Deadline:

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“ECR Disposition Concurrence” Workflow Task

Responsible Role: Approver

Review the ECN tasks and ECR disposition and vote “Approve” or “Do Not Approve”. Enter comments for “Do Not Approve.” At the bottom of the task page are details for “ECR Disposition Concurrence” tasks previously completed by other Approvers.

NOTE: “Do Not Approve” = nonconcurrency with ECR disposition; “Approve” = concurrence with ECR disposition.

Click the “**Task Complete**” button after entering comments and recording vote.

ECR Disposition Concurrence

Instructions: You have been selected to approve a Constellation Systems Enterprise Change Notice (ECN) as part of the change implementation process. Please complete this task on or before the Approval Deadline noted below:

- Click the “ECN” link below to open the ECN details page.
- Review the “Tasks” and “Attachments” for the ECN and provide comments (if required) in the Comments field.
- NOTE: ECR(s) covered by this ECN are listed under “Associated ECRs” on the ECN details page.
- Results of the on-going ECN review process are shown at the bottom of this screen.
- If you concur with the ECN, select the “Approve” radio button. Add comments in the Comments field if desired.
- If you do not concur with the ECN, select the “Do not approve” radio button. You MUST enter rationale in the Comments field.
- NOTE: Your nonconcurrency will not stop this process; however, your recommendation will be forwarded to the Board Chair.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: CDM Tester 1

Assignee: CDM Tester 1

Role: Approver

Priority: Highest

Due Date:

Process: ICE - CMII ECN Workflow_00561 - 12-07 ECN for Test ECR 8

[ECN 00561 - 12-07 ECN for Test ECR 8](#)

Approval Deadline: 01/20/2006

Comments:

☒ Approve
☐ Do not approve

Task Complete

Enter comments in the “Comments” text box and click the appropriate radio button.

Approval Deadline: 12/20/2005

Comments:

☒ Approve
☐ Do not approve

Task Complete

Completed	Reviews	Role	Approve	Comments
	Kathryn Hayden	Approver	Pending	
	(b)(4)	Approver	Pending	
	CDM Tester 1	Approver	Pending	

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Conduct CIB Review” Workflow Task

Responsible Role: Approver Chair

Review the ECN and the Approvers’ votes (listed in the table beneath the “**Task Complete**” button). Click the ECN link in the task to access the ECN’s Details page. Record the CIB decision and enter comments for “Amend ECN” or “Disapprove ECN” votes.

An “Amend ECN” vote requires the Change Admin II to update the ECN (per comments entered in this task). A “Disapprove ECN” vote cancels this ECN and the associated ECR(s).

Click the “**Task Complete**” button after entering comments and recording vote.


Conduct CIB Review

Instructions:

- Results of the ECN review process are shown at the bottom of this screen.
- Record Change Implementation Board (CIB) decision by selecting appropriate radio buttons and comment if necessary.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: (b)(4)
Assignee: (b)(4)
Role: Approver Chair

Priority: Highest
Due Date:
Process: ICE - CMII ECN Workflow_00461 - ECN-1114-001

 ECN 00461 - ECN-1114-001

Comments: Add more data to tasks and send back to approvers

☐ Approve ECN
☒ Amend ECN
☐ Disapprove ECN

Task Complete

Completed	Reviews	Role	Approve	Comments
2005-11-16 11:15:13 CST	(b)(4)	Approver	No	I don't concur because this needs more work
2005-11-16 11:15:26 CST	Kathryn Hayden	Approver	Yes	
2005-11-16 11:16:07 CST	CDM Tester 1	Approver	Yes	

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Amend ECN Plan” Workflow Task

Responsible Role: Change Admin II*

*NOTE: ECR Author also receives this task

Update the ECN per the Approver Chair comments. See “[Updating ECN from ECN Details Page](#)” for detailed instructions. Make only the changes required by the Approver Chair.

Click the “**Task Complete**” button after completing required updates.

Amend ECN Plan


Instructions: The Change Implementation Board (CIB) requires the ECN tasks to be amended.

- Update the ECN to amend the tasks as indicated in the CIB Comments below.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: (b)(4)
 Priority: Highest

Assignee:
Due Date:

Role: Change Admin II
 Process: ICE - CMII ECN Workflow_00461 - ECN-1114-001

 [ECN 00461 - ECN-1114-001](#)

Comments: Add more data to tasks and send back to approvers

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Update ECN and Implementation Plan” Workflow Task

Responsible Role: Change Admin II

Update the ECN to revise the “Need Dates” on the Implementation Plan tasks based on the approval date of the ECN. See “[Updating ECN from ECN Details Page](#)” for detailed instructions.

Click the “**Task Complete**” button after revising the dates for all Implementation Plan tasks.

Update ECN and Implementation Plan

Instructions: This task allows the Change Admin II to update the "Need Date" for each task in the ECN Implementation Plan. Follow the directions below for updating the Implementation Plan:

- Click the "ECN" link below to open the ECN Details page
- Choose "Update" from the pull-down menu and click the "Go" button
- Click the Implementation Plan tab to access the tasks
- Open each task and correct the "Need Date" (as required)
- When all changes are complete, click the "OK" button
- NOTE: The Implementation Plan task notification will not be sent out until this task has been completed.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: [CDM Tester 1](#)


Assignee: [CDM Tester 1](#)

Role: Change Admin II

Priority: Highest

Due Date:

Process: [ICE - CMII ECN Workflow_00561 - 12-07 ECN for Test ECR 8](#)

 [ECN 00561 - 12-07 ECN for Test ECR 8](#)

Task Complete

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Complete ECN Task” Workflow Task

Responsible Role: Assignee/Implementation Plan “Author” (Actionee)

Complete the work required by the Implementation Plan task and indicate completion of that work by completing this workflow task.

Click the ECN task link in this workflow task and update and/or add Resulting Items (if required). See “[Accessing Implementation Plan Tasks from Details Page](#),” “[Updating Resulting Items](#),” and “[Adding Resulting Items to ECN Implementation Plan Tasks](#)” for detailed instructions. NOTE: Do not add or update “Affected Data.” Complete this task on or before the “Need Date” for this Implementation Plan task.


Click the “**Task Complete**” button after completing work required by the Implementation Plan task.

Complete ECN Task

Instructions: You have been assigned a task as part of an Enterprise Change Notice (ECN):

- Click the ECN task link below.
- Review your assigned task under the “Tasks” section of the ECN details page.
- Complete the work required by the task and add relevant Resulting Items.
- Complete this assignment by clicking on the Task Complete button.

Process Initiator: (b)(4)	Priority: Highest
Assignee: Kathryn Hayden	Due Date:
Role: Assignee	Process: ICE - CMII CA Workflow_00262 - Task 2 of 2

 [ECN Task 00262 - Task 2 of 2](#)

Task Complete

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Review ECN Task” Workflow Task

Responsible Role: Reviewer/Implementation Plan “Designated User”

Review the completed Implementation Plan task and choose complete/rework vote, per task instructions. See “[Accessing Implementation Plan Tasks from Details Page](#)” and “[Accessing Resulting Items](#)” for detailed instructions. NOTE: Review “Resulting Items” only.


Click the “**Task Complete**” button after recording complete/rework vote and adding comments (if required).

Review ECN Task

Instructions: You have been assigned responsibility to review a completed task as part of an Enterprise Change Notice (ECN):

- Click the ECN task link below.
- Review the completed task under the “Tasks” section of the ECN details page.
- Review work performed on Resulting Items for the task.
- Record approval or rejection of the Resulting Items.
- If the task work is incomplete, select the Rework radio button and enter a comment explaining the needed rework.
- Complete this assignment by clicking on the Task Complete button.

Process Initiator: (b)(4)	Priority: Highest
Assignee: [Redacted]	Due Date:
Role: Reviewer	Process: ICE - CMII CA Workflow_00261 - Task 1 of 2

 [ECN Task 00261 - Task 1 of 2](#)

Comments:

☒ Complete
☐ Rework

Task Complete

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Rework ECN Task” Workflow Task

Responsible Role: Assignee/Implementation Plan “Author” (Actionee)

“Rework” is required for this Implementation Plan task, per the “Review ECN Task” task.

Review the Rework Comments in this task and perform the required rework. See “[Updating ECN from ECN Details Page](#),” “[Updating Resulting Items](#)” and “[Adding Resulting Items to ECN Implementation Plan Tasks](#).”

Click the “**Task Complete**” button when rework has been completed.

Rework ECN Task


Instructions: The work completed for your assigned task has been reviewed by the task's Designated User for the Enterprise Change Notice (ECN) task below:

- Review Designated User's rework comments below.
- Perform required modifications to the Resulting Items.
- Complete this assignment by clicking on the Task Complete button.

Process Initiator: b)(4)
 Priority: Highest

Assignee: Kathryn Hayden
 Due Date:

Role: Assignee
 Process: ICE - CMII CA Workflow_00262 - Task 2 of 2

 ECN Task 00262 - Task 2 of 2

Comments: Rework this task

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Release Data” Workflow Task

Responsible Role: Evaluator (Receipt and Release Desk)

Complete the release process(es) appropriate for the data.

Click the “**Task Complete**” button after release process(es) are complete.

Release Data


Instructions:

- Release the Resulting Items, using the appropriate release process.
- Complete this assignment clicking on the Task Complete button.

Process Initiator: (b)(4) **Priority:** Highest

Assignee: Kathryn Hayden **Due Date:**

Role: Evaluator **Process:** ICE - CMII ECN Workflow_00461 - ECN-1114-001

 ECN 00461 - ECN-1114-001

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

“Audit ECN” Workflow Task

Responsible Role: Change Admin III (Receipt and Release Desk)

Review the ECN and the Implementation Plan tasks by clicking the ECN link in this workflow task and reviewing the ECN details and the documents in Resulting Items (if applicable). See “[Accessing Implementation Plan Tasks from Details Page](#)” and “[Accessing Resulting Items from ECN Details Page](#)” for detailed instructions.

Click the “**Task Complete**” button after recording complete/rework vote. This will complete the ECN workflow.

Audit ECN


Instructions:

- Click the "ECN" task link below to open the ECN details page.
- Review the data modifications in the ECN.
- Record approval or rejection of ECN implementation.
- If rework is required, select the Rework radio button and enter a comment explaining the needed rework.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: (b)(4)
 Priority: Highest

Assignee: (b)(4)
 Due Date:

Role: Change Admin III
 Process: ICE - CMII ECN Workflow_00461 - ECN-1114-001

 [ECN 00461 - ECN-1114-001](#)

Rework Comments:

☐ Complete
 ☒ Rework

Task Complete

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

Appendix: General Workflow Instructions

Updating ECR from ECR Details Page

On the ECN Details page, choose “Update” from the pull-down menu and click the “Go” button. Changes may be made to Description information. Affected Data and Attachments may be added, revised or removed.

ECR-1114-001		Update	Go
Description: description			
Number: 00604			
Responsible Product: Constellation			
ECR Type: NASACHangeRequest			
Created by: (b)(4)		Change Admin I: (b)(4)	
Category: Programmatic Issue		Team: 00604 - ECR-1114-00118164	
Priority: Routine		State: Implementation	
Created: 2005-11-14 12:45:56 CST		Track: Complex	
Last modified: 2005-11-16 11:19:29 CST		Change Review Board approval: 2005-11-14 13:31:04 CST	
Need by: 0005-11-30 00:00:00 CST		Resolved: 2005-11-16 11:19:29 CST	
Submitted: 2005-11-14 13:11:06 CST			
Proposed Solution:			
Recurring cost estimate:		Non-recurring cost estimate:	
Review Board decision: Approved			
Review Board comments: recommend approval			
01. PCN: 123456		02. ECR Number: KN-ECR-001	
03. Initiator: (b)(4)		04. Initiator Organization: NP	
05. Initiator Email: (b)(4)		06. Initiator Telephone: 256-544-2732	
07. Element Effectivity: CLV		08. Element Effectivity: na	
09. Element Effectivity: na		10. Element Effectivity: na	
11. Element Effectivity: na		12. Element Effectivity: na	

Use the “Back” button on the Web toolbar to return to previous location in this document.

Assigning Roles to Participants in Workflow Tasks

Choose the "Role" from the pulldown menu

Click the "Users" tab

Enter "User Name" or "User ID" in appropriate block (or partial entries, using "*" as wildcard)

Click the "Find" button

Click the correct user in the lower left-hand side of this screen

Click the "Add>>" button to assign this user to the "Role"

If any users need to be removed from the "Participants" table, click the name and then click the "<<Remove" button

Follow these steps for each of the Roles to be assigned in this task.

When complete, click the "Save" button to save role/participant assignments

NOTE: Participants must be members of this Product to be available for role assignment.

Role: Evaluator

Groups **Users** Organizations

Source: gov.nasa.nis.Ldap

User Name: (b)(4) Find

User ID:

Group:

User Name	User ID	Source
(b)(4)		gov.nasa.nis.L

Add >> Add All >> << Remove << Remove All

Participants:

Principal	Source
khayden (Kathryn Hayden)	gov.nasa.nis.L
prigsby (b)(4)	gov.nasa.nis.L

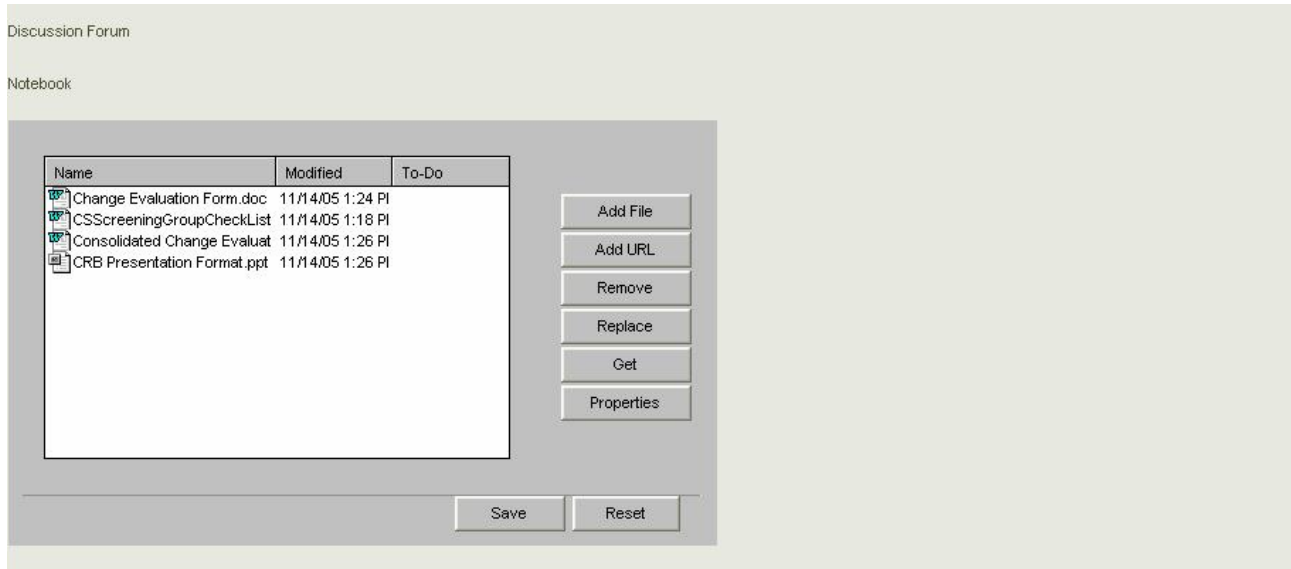
Save Reset Help

Use the "Back" button on the Web toolbar to return to previous location in this document.

Attaching Files into Workflow Tasks

In the “Add File” box at the bottom of the workflow task:

- Click the “**Add File**” button
- Browse to the file and click “Open”
- The file will appear in the list below with “ADD” in the “To-Do” column.
- Click the “**Save**” button to save the file to the workflow contents. **NOTE:** The file is not attached until you “Save” it.



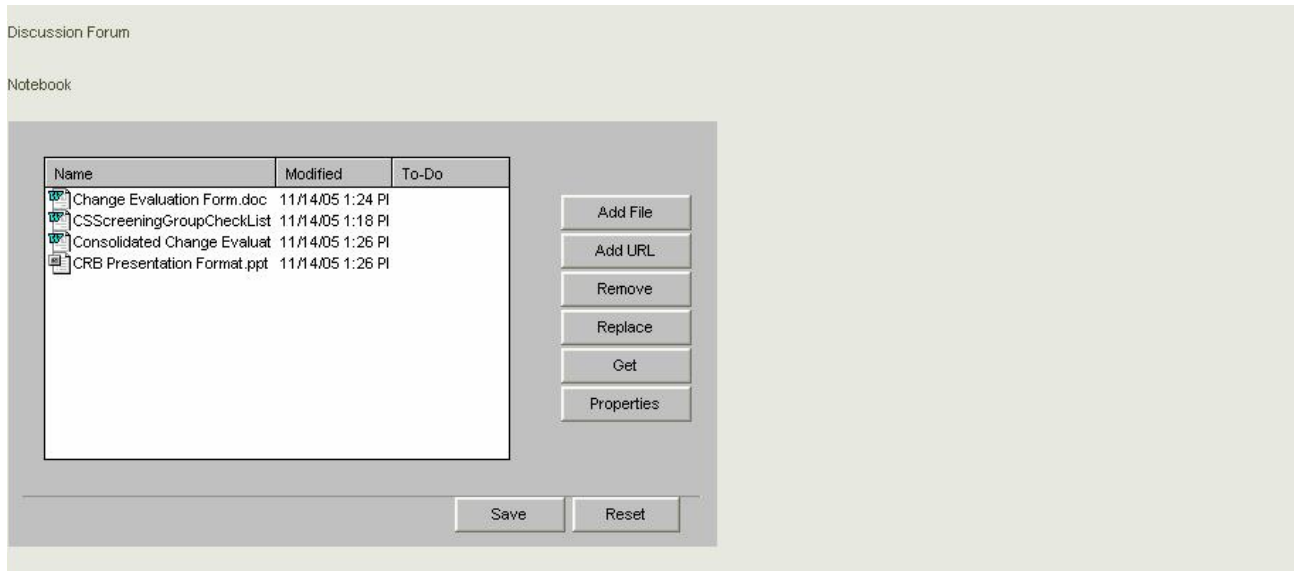
Use the “Back” button on the Web toolbar to return to previous location in this document.

Obtaining Attached Files from Workflow Tasks

In the “Add File” box at the bottom of the workflow task:

- Click the file name
- Click the “**Get**” button
- Choose “Open” or “Save File to disk”

NOTE: Files must be saved to disk before changes can be made to them. If changes are made to files with the “Open” option, the changes will not be saved.



Use the “Back” button on the Web toolbar to return to previous location in this document.

Adding Affected Data to ECN Implementation Plan Tasks

To add “Affected Data” to an Implementation Plan task, click the “Add Affected Data” link and search for the document using the fields on the “Find Affected Data” window.

The screenshot shows the 'Implementation Plan' window with tabs for Description, Attachments, Associated ECRs, and Implementation Plan. The 'Task 1 of 2' section contains the following fields:

- Task Name:** Task 1 of 2
- Task Type:** Change Activity
- Description:** Make changes to the document per instructions
- Author:** khayden (with a 'Browse...' button)
- Designated User:** knorris (with a 'Browse...' button)
- Need Date:** 12/10/2005 (MM/DD/YYYY)

Below these fields are two sections:

- Affected Data:** Includes a table with columns: Number, Name, Version, State, Disposition. The table is currently empty, displaying 'No Items to Display'. A link 'Add Affected Data' is present.
- Resulting Items:** Includes a table with columns: Number, Name, Version, State, Effectivity. The table is currently empty, displaying 'No Items to Display'. A link 'Add Resulting Item' is present.

At the bottom right are 'OK' and 'Cancel' buttons.

Enter search criteria in one or more fields in this window and click the “**Search**” button.

NOTE: “*” may be used for partial entries.

The screenshot shows the 'Find Affected Data' window with a dropdown menu set to 'Document'. The search criteria fields are:

- Number:** [Text Field]
- Name:** [Text Field]
- Type:** [Dropdown Menu]
- Version:** [Text Field]
- State:** [Dropdown Menu]
- Format:** [Dropdown Menu]
- Created By:** *hayden (with a 'Browse...' button)
- Updated By:** [Text Field] (with a 'Browse...' button)
- Last Updated:** [Text Field] (MM/DD/YYYY)

A 'Search' button is located at the bottom center.

Use the “Back” button on the Web toolbar to return to previous location in this document.

Select the affected data from the “Search Results” window by checking the box next to each document. Click the “**Add Selected Items**” button at the bottom of the window.

Search Results

All

	Number	Name	Version	Team	State	Last Updated
<input type="checkbox"/>	 0000017841	Test for ECN process	A	0000017841 - Test for ECN process A17128	In Work	2005-08-26 10:39:37 CDT
<input type="checkbox"/>	 0000018901	Sample document	B	0000018901 - Sample document B17850	Released	2005-10-20 15:57:56 CDT
<input type="checkbox"/>	 0000018902	Sample document	B	0000018902 - Sample document B17857	Released	2005-10-21 11:26:27 CDT
<input checked="" type="checkbox"/>	 0000019142	Sample document3	A	0000019142 - Sample document3 A18169	Released	2005-11-14 15:14:21 CST
<input type="checkbox"/>	 0000019143	Sample NEW DRAFT document3	A	0000019143 - Sample NEW DRAFT document3 A18170	In Work	2005-11-14 15:14:22 CST

Add Selected Items

Use the “Back” button on the Web toolbar to return to previous location in this document.

Adding Resulting Items to ECN Implementation Plan Tasks

To add “Resulting Items” to an Implementation Plan task, follow these instructions for adding revised or new documents as “Resulting Items.”

If the task is to revise an existing document, click the box next to the affected document and then click “Revise” at the top of the “Affected Data” table. A newer version of the affected document will now appear under the “Resulting Items” list. This newer version will be the version that is updated to complete this task. NOTE: The original affected document must be in the “Released” life cycle state.

Create Enterprise Change Notice (ECN)

Description | Attachments | Associated ECRs | Implementation Plan

All Remove Add New Task

Task 1 of 2

Task Name: Task 1 of 2

Task Type: Change Activity

Description: Make changes to the document per instructions

Author: khayden Browse... Designated User: knorris Browse...

Need Date: 12/10/2005 (MM/DD/YYYY)

Affected Data:

Number	Name	Version	State	Disposition
0000019142	Sample document3	A	Released	

Resulting Items:

Number	Name	Version	State	Effectivity
0000019142	Sample document3	B	In Work	

OK Cancel

If the task is to develop a new document, click the “Add Resulting Item” link and search for the draft document using the fields on the “Find Resulting Data” window (next page). NOTE: A “Version A” of the document must be posted to Product/Folders on Windchill before it can be added as a “Resulting Item.”

Create Enterprise Change Notice (ECN)

Description | Attachments | Associated ECRs | Implementation Plan

All Remove Add New Task

Task 1 of 2

Task Name: Task 1 of 2

Task Type: Change Activity

Description: Make changes to the document per instructions

Author: khayden Browse... Designated User: knorris Browse...

Need Date: 12/10/2005 (MM/DD/YYYY)

Affected Data:

Number	Name	Version	State	Disposition
0000019142	Sample document3	A	Released	

Resulting Items:

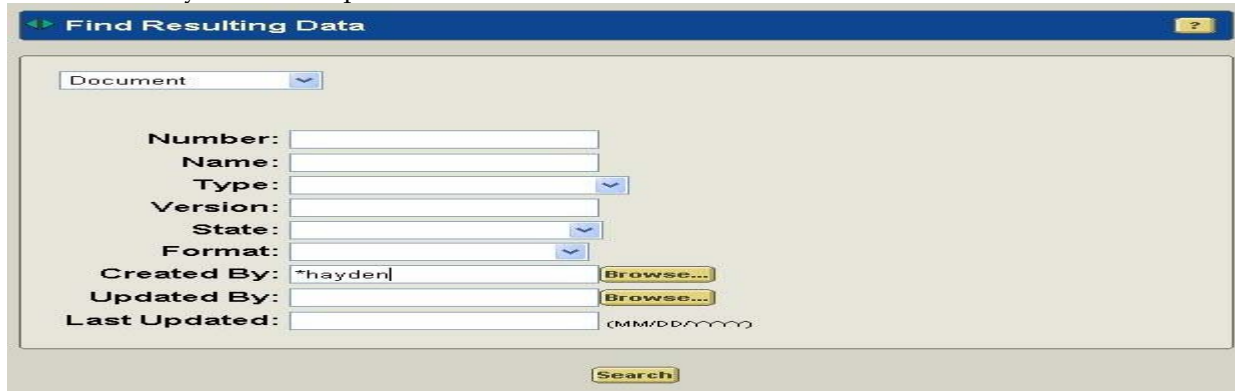
Number	Name	Version	State	Effectivity
0000019142	Sample document3	B	In Work	

OK Cancel

Use the “Back” button on the Web toolbar to return to previous location in this document.

Enter search criteria in one or more fields in this window and click the **Search** button.

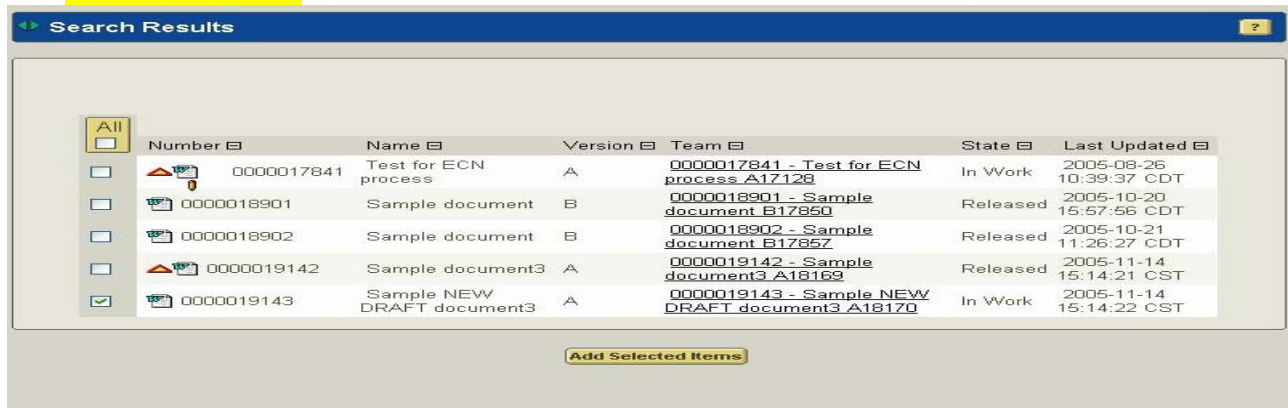
NOTE: "*" may be used for partial entries.



The "Find Resulting Data" window contains the following fields and controls:

- Document: [Dropdown]
- Number: [Text Box]
- Name: [Text Box]
- Type: [Dropdown]
- Version: [Text Box]
- State: [Dropdown]
- Format: [Dropdown]
- Created By: [Text Box] khayden [Browse...]
- Updated By: [Text Box] [Browse...]
- Last Updated: [Text Box] (MM/DD/YYYY)
- [Search] button

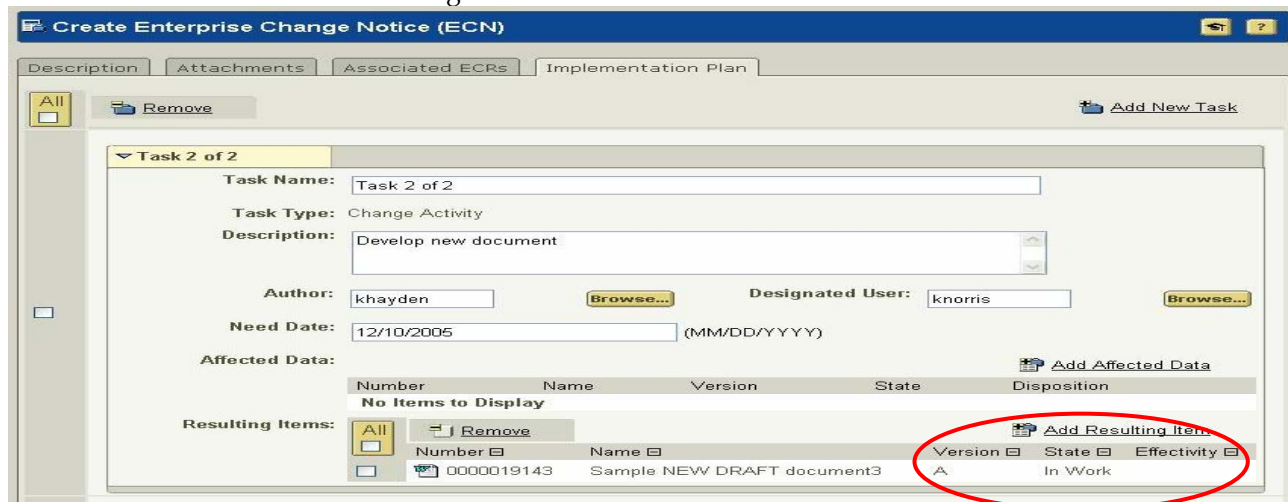
Select the document from the "Search Results" window by checking the box next to each document. Click the **Add Selected Items** button at the bottom of the window.



	Number	Name	Version	Team	State	Last Updated
<input type="checkbox"/>	0000017841	Test for ECN process	A	0000017841 - Test for ECN process A17128	In Work	2005-08-26 10:39:37 CDT
<input type="checkbox"/>	0000018901	Sample document	B	0000018901 - Sample document B17850	Released	2005-10-20 15:57:56 CDT
<input type="checkbox"/>	0000018902	Sample document	B	0000018902 - Sample document B17857	Released	2005-10-21 11:26:27 CDT
<input type="checkbox"/>	0000019142	Sample document3	A	0000019142 - Sample document3 A18169	Released	2005-11-14 15:14:21 CST
<input checked="" type="checkbox"/>	0000019143	Sample NEW DRAFT document3	A	0000019143 - Sample NEW DRAFT document3 A18170	In Work	2005-11-14 15:14:22 CST

[Add Selected Items] button

A "Version A" of the new document will now appear in the "Resulting Items" list. This version will be the first version of the document resulting from this task.



The "Create Enterprise Change Notice (ECN)" window shows the following details:

- Task Name: Task 2 of 2
- Task Type: Change Activity
- Description: Develop new document
- Author: khayden [Browse...]
- Designated User: knorris [Browse...]
- Need Date: 12/10/2005 (MM/DD/YYYY)
- Affected Data: [Add Affected Data]
- Resulting Items:

Number	Name	Version	State	Disposition
0000019143	Sample NEW DRAFT document3	A	In Work	

The "Add Resulting Item" button is circled in red.

Use the "Back" button on the Web toolbar to return to previous location in this document.

Updating ECN from ECN Details Page

On the ECN Details page, choose “Update” from the pull-down menu and click the “Go” button. Changes may be made to Description information. Associated ECRs and Implementation Plan tasks may be added, revised or removed.

 **ECN-1114-001**

Update  

Description: ECR to disposition ECR-1114-001

Number: 00461

Responsible Product: Constellation

ECN Type: NASACHangeNotice

Created by: 

Created: 2005-11-16 10:22:59 CST

Last modified: 2005-11-16 10:46:04 CST

Need by: 2005-12-31 00:00:00 CST

Submitted:

Change Admin II: [Kathryn Hayden](#)

Team: [00461 - ECR-1114-00118191](#)

State: Open

Change Implementation Board approval:

Change Admin III: [Katrina Norris](#)

Released:

Change Implementation Board comments:

Audit comments:

ECR Disposition: ECR-1114-001 was approved as presented on 11/14/05

▶ Related ECRs 

▶ Attachments 

▼ Tasks 

▶ ECR-1114-001 : Task 2 of 2

▶ ECR-1114-001 : Task 1 of 2

Use the “Back” button on the Web toolbar to return to previous location in this document.

Accessing Implementation Plan Tasks from Details Page

On the ECR Details page, scroll down to the “Tasks” section:

ECN-1114-001 Update Go

Description: ECR to disposition ECR-1114-001
Number: 00461
Responsible Product: Constellation
ECN Type: NASACHangeNotice
Created by: (b)(4)
Created: 2005-11-16 10:22:59 CST
Last modified: 2005-11-16 11:21:31 CST
Need by: 2005-12-31 00:00:00 CST
Submitted: 2005-11-16 10:51:36 CST

Change Admin II: (b)(4)
Team: 00461 - ECR-1114-00118191
State: Implementation
Change Implementation Board approval:
Change Admin III: (b)(4)
Released:

Change Implementation Board comments: Approved as amended
Audit comments:
ECR Disposition: ECR-1114-001 was approved as presented on 11/14/05

▶ **Related ECRs** ?

▶ **Attachments** ?

Expand the task by clicking the arrow next to the Task Name.

▼ **Tasks** ?

▶ **ECN-1114-001 : Task 2 of 2**

▼ **ECN-1114-001 : Task 1 of 2**

Task Name: Task 1 of 2
Task Type: Change Activity
Description: Make changes to the document per instructions
Number: 00261
Author: Kathryn Hayden
Designated User: (b)(4)
Need by: 2005-12-10 00:00:00 CST

Affected Data: All Revise Remove Update Disposition Add Affected Data

Number	Actions	Name	Version	State	Disposition
0000019142	i ▲	Sample document3	A	Released	

Resulting Items: All Remove Add Resulting Item

Number	Actions	Name	Version	State
0000019142	i ▲	Sample document3	B	In Work

Related Processes:

Process	State	Owner
ICE - CMII CA Workflow_00261 - Task 1 of 2	Running	(b)(4)

Use the “Back” button on the Web toolbar to return to previous location in this document.

Accessing Resulting Items from ECN Details Page

Open the ECN Details page and scroll down to the "Tasks" section

ECN-1114-001 Update Go

Description: ECN to disposition ECR-1114-001
Number: 00461
Responsible Product: Constellation
ECN Type: NASACHangeNotice
Created by: (b)(4)
Created: 2005-11-16 10:22:59 CST
Last modified: 2005-11-16 11:21:31 CST
Need by: 2005-12-31 00:00:00 CST
Submitted: 2005-11-16 10:51:36 CST

Change Admin II: (b)(4)
Team: 00461 - ECN-1114-00118191
State: Implementation
Change Implementation Board approval:
Change Admin III: (b)(4)
Released:

Change Implementation Board comments: Approved as amended
Audit comments:
ECR Disposition: ECR-1114-001 was approved as presented on 11/14/05

▶ Related ECRs ?

▶ Attachments ?

Expand the task by clicking the arrow next to the Task Name. Under "Resulting Items," click the corresponding link under "Number" to open the document. NOTE: Only "Resulting Items" should be reviewed. Do not click the documents(s) under "Affected Data."

▼ Tasks ?

▶ ECN-1114-001 : Task 2 of 2

▼ ECN-1114-001 : Task 1 of 2

Task Name: Task 1 of 2
Task Type: Change Activity
Description: Make changes to the document per instructions
Number: 00261
Author: Kathryn Hayden
Designated User: (b)(4)
Need by: 2005-12-10 00:00:00 CST

Affected Data:

Number	Actions	Name	Version	State	Disposition
0000019142		Sample document3	A	Released	

Resulting Items:

Number	Actions	Name	Version	State
0000019142		Sample document3	B	In Work

Related Processes:


Process	State	Owner
ICE - CMII CA Workflow_00261 - Task 1 of 2	Running	

Use the "Back" button on the Web toolbar to return to previous location in this document.

Updating Resulting Items

On the ECN Details page, expand the appropriate task. Click the circled “i” icon next to the document under “Resulting Items.”

The screenshot shows the 'ECN-1114.001 : Task 1 of 2' details. Under the 'Resulting Items' section, there is a table with columns: Number, Actions, Name, Version, State, and Disposition. The first row shows '0000019142' with a circled 'i' icon in the Actions column, followed by 'Sample document3', 'A', 'Released', and an empty Disposition field.

Number	Actions	Name	Version	State	Disposition
0000019142		Sample document3	A	Released	

On the “Resulting Item’s” Details page, choose “Check Out and Download” from the pull-down menu and click the “Go” button.

The screenshot shows the details for 'Sample document3'. The 'View' dropdown menu is open, showing options: View, Discuss, Check Out and Download (highlighted), Create ECR, Delete, Copy, Add to Project, and Export. The 'Go' button is next to the dropdown.

Responsible Product: Constellation
Number: 0000019142
Name: Sample document3
Title:
Version: B.1
Type: Document
Status: Checked in
Team: 0000019142 - Sample document3 B18195
State: In Work - Released - Cancelled
Location: / Constellation / Katrina Tests

Primary: Sample document3.doc
Format: Microsoft Word
File Size: 19.5 KB
Last Updated: 2005-11-14 15:14:36 CST

Created By: b(4)
Created: 2005-11-16 10:36:46 CST
Updated By: b(4)
Last Updated: 2005-11-16 10:36:46 CST

Related Parts

Name	Actions	Number	Version	Context	Type	Association	Life Cycle	Team	Last Updated
No Items to Display									

Save the file to your workstation to make changes. “Check in” document after changes are completed.

Use the “Back” button on the Web toolbar to return to previous location in this document.

After completing changes to the “Resulting Item” file, go to the “Resulting Item’s” Details page, choose “Check In” from the pull-down menu and click the “Go” button. Windchill will browse to the location to which the file was downloaded during “Check Out and Download.”

Sample document3 View

View
Discuss
Check In
Undo Checkout
Create ECR
Update

Responsible Product: [Constellation](#)
Number: 0000019142
Name: Sample document3
Title:
Version: B.1
Type: Document
Status: Work in progress ([Details of original](#))

Primary: [Sample document3.doc](#)
Format: Microsoft Word
File Size: 19.5 KB
Last Updated: 2005-11-14 15:14:36 CST

Created By: (b)(4)
Created: 2005-11-16 10:36:46 CST
Updated By: [Kathryn Hayden](#)
Last Updated: 2005-11-16 12:29:28 CST

Team: [0000019142 - Sample document3 B18195](#)
State: In Work - Released - Cancelled
Location: / [Constellation](#) / [Katrina Tests](#)

Versions

Version	Actions	Life Cycle	Team	Last Updated	Created By	Created
<input type="checkbox"/> B		In Work	0000019142 - Sample document3 B18195	2005-11-16 12:29:28 CST	(b)(4)	2005-11-16 10:36:46 CST
<input type="checkbox"/> B		In Work	0000019142 - Sample document3 B18195	2005-11-16 10:36:46 CST	(b)(4)	2005-11-16 10:36:46 CST
<input type="checkbox"/> A		Released	0000019142 - Sample document3 A18169	2005-11-14 15:14:21 CST	Kathryn Hayden	2005-11-14 15:14:21 CST

Related Parts
Related Documents
Associated Changes
Attachments
Document Structure
Used By
Baselines
Versions

Use the “Back” button on the Web toolbar to return to previous location in this document.